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Institute of Education
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IOE Library Guide

EndNote X3 with Word 2007

What is EndNote?

EndNote is a bibliographic reference manager, which allows you to maintain a personal '**library**' of all your references to books, journal articles, theses and websites. It also allows you to search online bibliographic databases and library catalogues and import these references directly into EndNote.

You can then effortlessly reproduce those references in your own writing assignment, thesis, article or reading list in hundreds of different bibliographic styles. EndNote's 'Cite While You Write' feature automatically formats citations, figures, and tables in Microsoft Word to produce a complete bibliography with in-text references. Previous versions of Word had a 'floating' EndNote toolbar. This has been replaced by the EndNote tab in the Word 2007 ribbon. The functionality is basically the same and includes integration with Word's new referencing system.

Although EndNote is designed as a bibliographic database you do not need to restrict yourself only to references to documents. You can add all sorts of other material to your EndNote library such as personal communications from supervisors and other authors or your own developing thoughts.

Accessing EndNote at the Institute

We currently have EndNote X1 on Institute PCs and Macs as a Word 'plug-in' (see '**getting started**' below'). EndNote X4 will be available autumn 2010.

Buying a copy for your own computer

The latest version, EndNote X4 is available to buy and install on your own machine from https://edustore.adeptscience.co.uk/. You will also find guidance about minimum system requirements.

Staff and students can buy it for a very much reduced price because Information Services has a site licence. You can use the IP option within the IOE but will need your ATHENS account to access the site remotely. You must provide full credit card/email details and a delivery address in the UK or abroad if ordering the hard copy.

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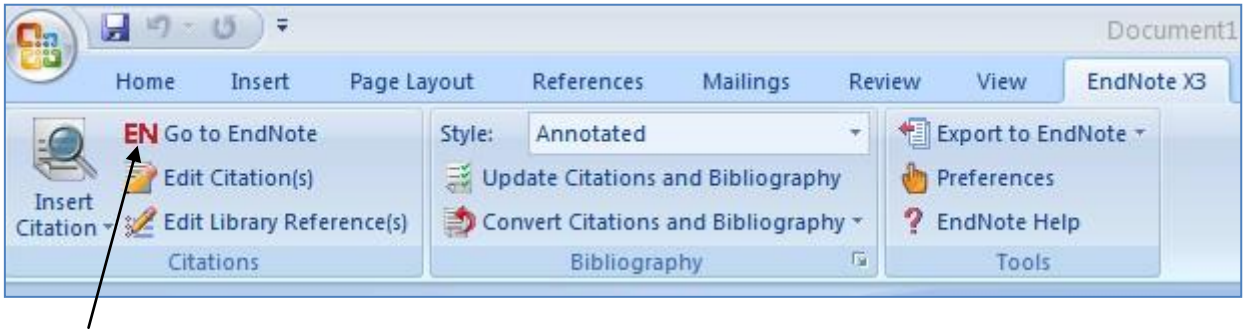
Help and advice

This is only a brief introductory guide to EndNote. For further sources of information please see -

- EndNote's inbuilt help function accessible via the onscreen menu.
- The complete user manual provided with the software.
- EndNote support pages on the Intranet - intranet.ioead/ioe/cms/get.asp?cid=10170&10170_0=9826.
- Library staff at lib.enquiries@ioe.ac.uk.
- EndNote technical support staff - www.adeptscience.co.uk/kb/.

Getting started

- If using the networked version, click on the desktop icon or launch EndNote within Word using the **Go to EndNote** command on the EndNote tab (see below).



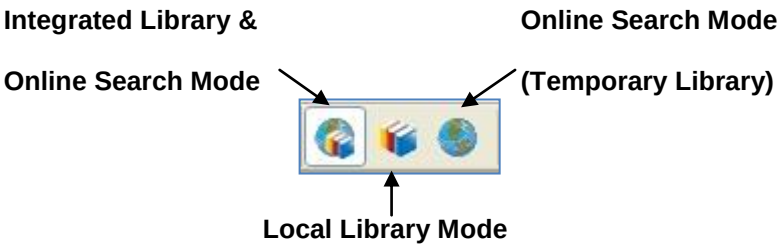
Launch EndNote

- If using your own version on a PC select **Start menu > All Programs > EndNote > EndNote Program** or create a desktop shortcut.
- A dialog box appears prompting you either to open an existing library (select browse to navigate to it) or create a new one and rename as appropriate.
- EndNote has provided one called **Paleo** for demonstration purposes. All saved libraries have the suffix **.enl**.
- By default, networked computers save libraries to the N drive.
- It is important to make back-up copies of libraries and the corresponding **.DATA** folder. Use the compressed library feature by selecting **File > Compressed Library (enlx)** at the top of the library screen to save/email a copy of your library and attached files if required.

Entering references into EndNote

References can either be added manually to a library or automatically imported/exported from remote databases and catalogues thus saving considerable time and effort. Advice on how to select and sort references and navigate within your library is included below under '**managing references**'.

You can choose between three new display modes in the X3 library window which offer different features.



With **Integrated Library & Online Search Mode** all groups and commands are available and any references downloaded from an online search are **automatically** saved to your open library (see below).

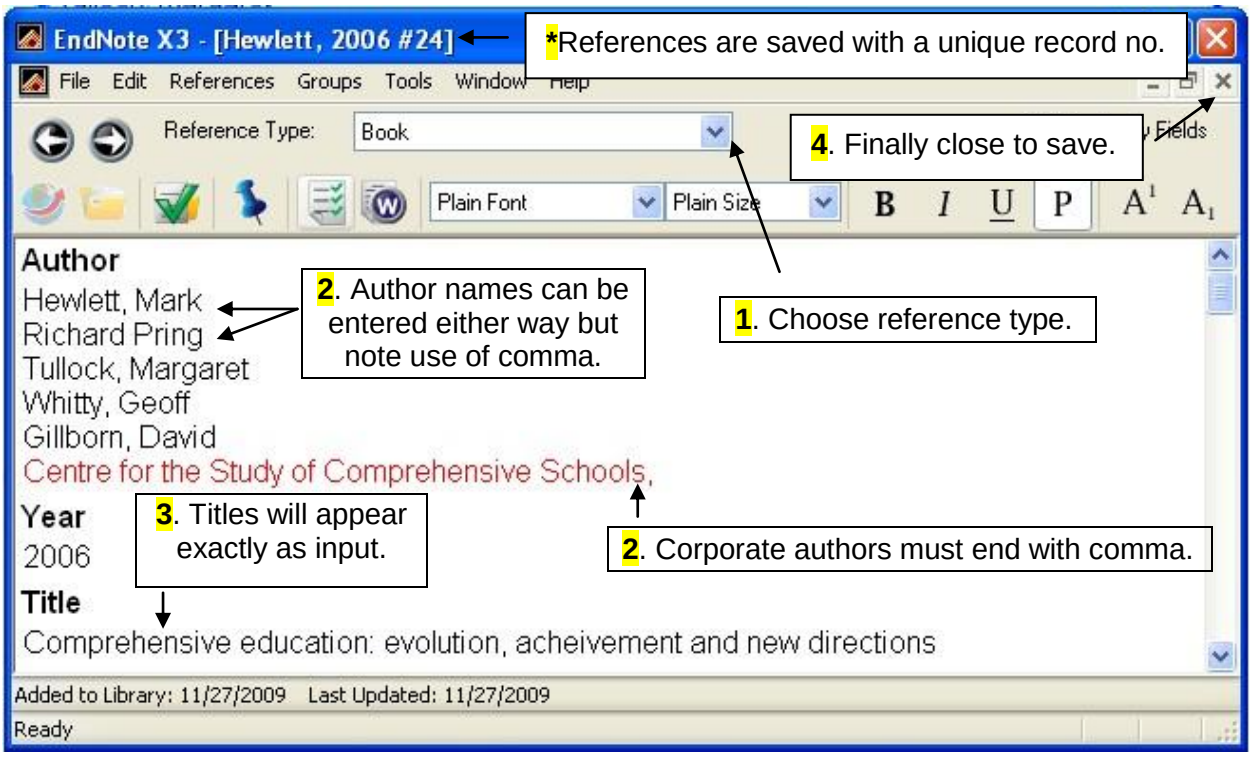
The other option is to work in **Local Library Mode,** where online search groups are not available and switch to **Online Search Mode** when you wish to search and download references from an online resource. These references can be saved to a temporary library for review.

Manual Input

This might be the best option for familiarising yourself with EndNote's basic functionality. To add references manually –

1. Open a new or existing library.
2. Select **References > New Reference** from the on screen drop-down menu top-left.
3. Select the appropriate readymade reference template (there are over 40 versions) for each entry from the **reference type** dropdown at the top of the window (see illustration below).
4. Enter bibliographic data into each of the fields, adding as **much** information as possible, checking the accuracy of details carefully whilst following these basic rules –

    - Author names are entered one name per line with either last name followed by a comma and then first name, for example '**Whitty, Geoff**' or simply as '**Geoff Whitty**'. EndNote will assume the last word is the 'Surname' and the other words are forenames if the comma is not used.
    - If you are entering initials instead of full forenames, be sure to type a space between initials. Using full forenames is preferable as some styles do specify that format.


EndNote X3 - [Hewlett, 2006 #24]
*References are saved with a unique record no.
File Edit References Groups Tools Window Help
Reference Type: Book
4. Finally close to save.
Plain Font
Plain Size
Author
Hewlett, Mark
Richard Pring
Tullock, Margaret
Whitty, Geoff
Gillborn, David
Centre for the Study of Comprehensive Schools,
2. Author names can be entered either way but note use of comma.
1. Choose reference type.
Year
2006
3. Titles will appear exactly as input.
2. Corporate authors must end with comma.
Title
Comprehensive education: evolution, acheivement and new directions
Added to Library: 11/27/2009 Last Updated: 11/27/2009
Ready

- Special bibliographic formatting and punctuation such as abbreviation or italicising journal names should **not** be included. Enter only the raw data and leave the formatting to EndNote.
- Styles will not alter the capitalisation of titles. They will appear in the bibliography as originally input.
- You can include abstracts, comments, keywords, quotes and research notes in the relevant fields where appropriate.
- EndNote uses **term lists** for the Author, Journals, and Keywords fields. If you begin to enter a name, journal or keyword that you have used before in that library, EndNote will auto-complete the term for you to speed up data entry. Text formatting in red is unique to your library.
- To link a file to a reference in your EndNote library, first highlight your chosen reference and then either –

    - Select **References > File Attachments > Attach File** and navigate to the appropriate file. See the '**finding full text**' section below also.
    - Open the reference and simply copy and paste or drag and drop the file into the file attachments field. Attachments are saved with your library in the **.DATA** folder.

- Each reference can be edited or amended at any time and any changes saved when closed. All references are given a unique record number which cannot be changed.

Automatic Input

Three import/export options are available to directly transfer references from remote databases or library catalogues into EndNote –

1. Exporting references directly from within individual databases to EndNote.
2. Using EndNote's own search function to retrieve references from remote resources.
3. Searching remote resources directly and importing results into EndNote using a customised import filter.

Some manual re-formatting may be required with all three operations if data is not imported into the correct reference fields but try searching for your existing references this way to save time.

See the Intranet for the best methods for transferring references from individual resources into EndNote - intranet.ioead.ac.uk/ioe/cms/get.asp?cid=10170&10170_0=13428#connection.

1. Direct Export

This is perhaps the best option as it combines the powerful search capabilities within individual resources with automatic export to EndNote. Databases which offer this include Australian Education Index (AEI), British Education Index (BEI) and ERIC via Dialog DataStar, International Bibliography of the Social Sciences (IBSS) and Web of Science.

Most Individual publishers such as SwetsWise, ScienceDirect and Informaworld now also offer a direct export option as does Google Scholar.

The export process may differ slightly between resources but your marked or saved reference list will be sent directly to the EndNote library of your choosing.

See our individual eLibrary resource guides for further details – www.ioe.ac.uk/library/guides.

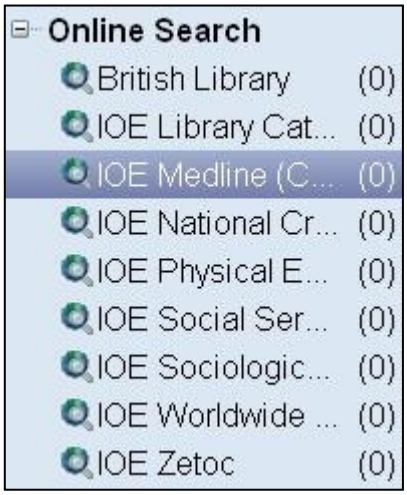
2. EndNote Search

EndNote provides a powerful search interface for both searches of EndNote libraries (see '**managing references**' below) and searches of remote databases or library catalogues. This interface may not offer the sophisticated search options available within individual databases but is a very fast and efficient way of retrieving and importing basic search results. Pre-configured **connection files** to enable such searches are provided for a wide range of resources. See '**content files**' below for more information about using these with your own computer.

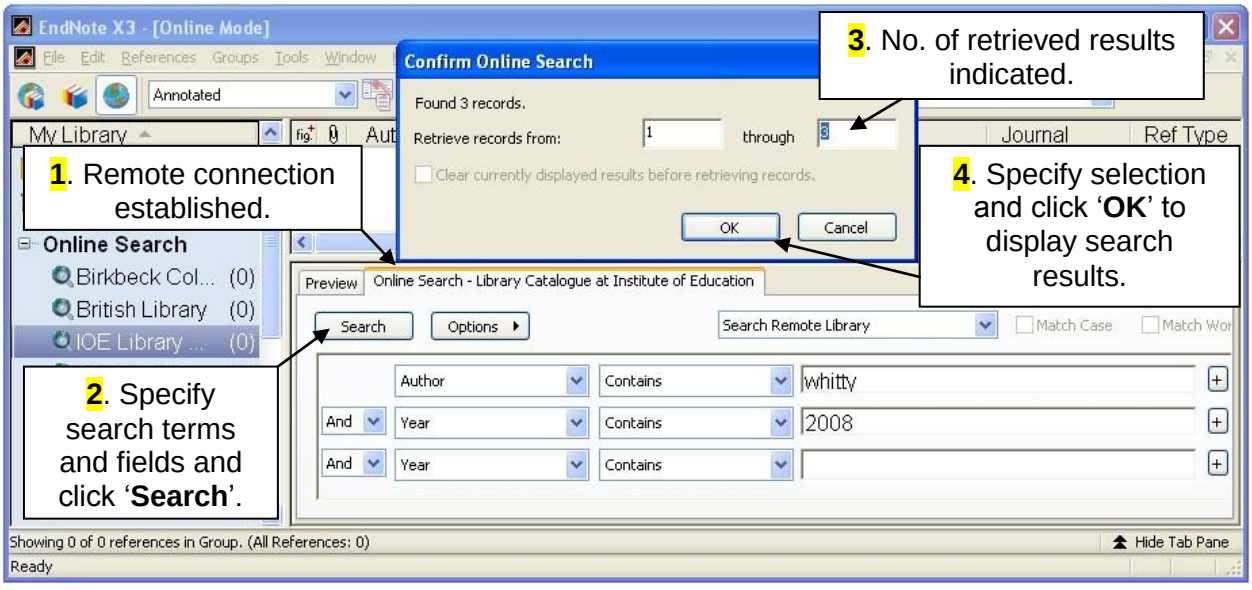
To establish an external connection to a given resource –

1. Open a new or existing library.
2. Choose either **Integrated Library & Online Search Mode** to import results directly into your library or **Online Mode** to import into an interim temporary library.
3. Select your chosen resource from the left hand search menu (see illustration below).
4. If it does not appear by default select **More** to access the **connection manager** interface.

5. Alternatively select **Tools > Online Search** from the on screen drop-down menu top-left, browse and select the appropriate resource from the alphabetical list and click **Choose**.
6. Resources selected in this way or searched previously will remain displayed in the online search group window. Specific Institute resources are grouped together prefaced by IOE.



7. EndNote may prompt you for an **ATHENS** username and password if accessing **ATHENS** protected resources at the Institute or remotely.
8. When the connection is established (see illustration below) the search interface will open ready for you to enter your search terms into the appropriate field(s). Then click on **Search**. The search options available will vary within each database or catalogue.
9. EndNote will perform the search and display the number of references that were found to match your search criteria. You have the option of retrieving all of the references or a specific range of references. Click **OK** to retrieve and view these references.
10. We strongly advise you create a **temporary holding library** to copy references to using the **Copy References To** command for initial analysis/editing. Only **Online Search Mode** will offer this option. When you are happy with the selection, references can then be copied to your 'main library and assigned to custom groups as required.



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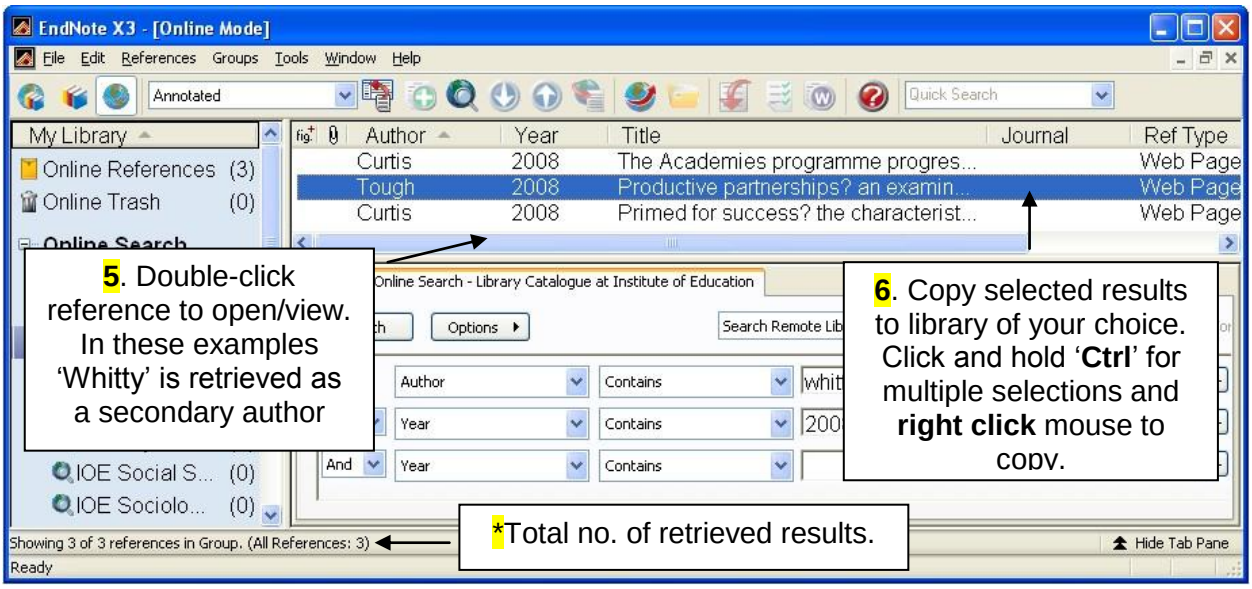
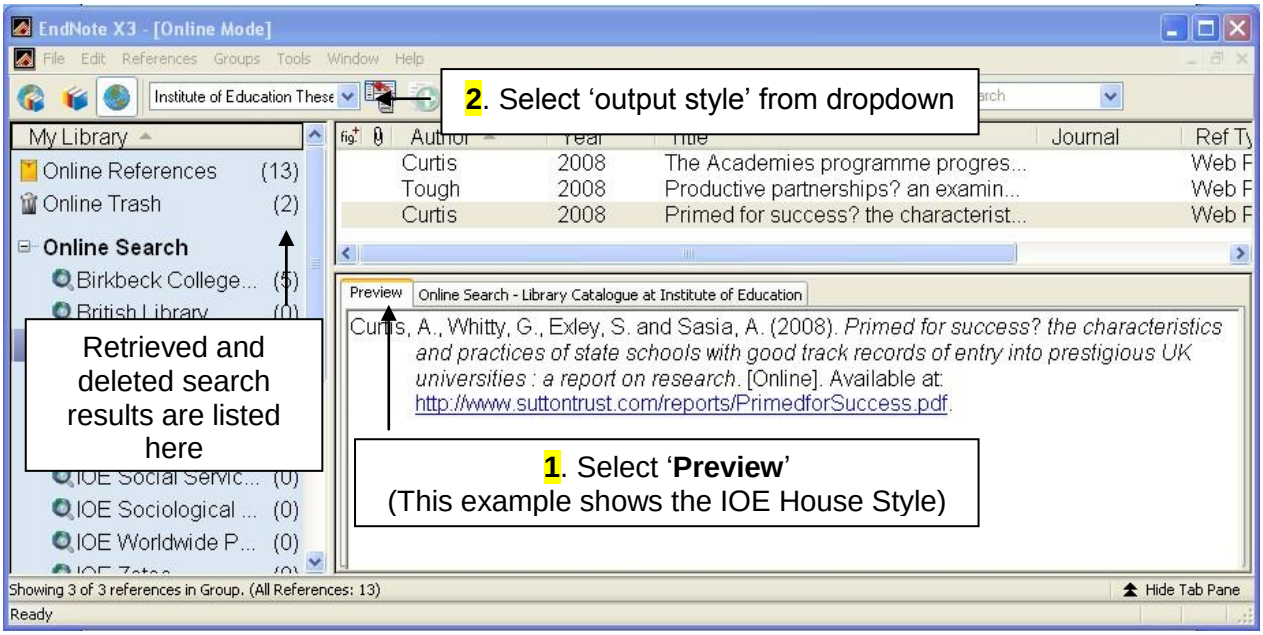

EndNote X3 - [Online Mode]
File Edit References Groups Tools Window Help
Annotated
Quick Search
My Library
Online References (3)
Online Trash (0)
Online Search
IOE Social S... (0)
IOE Sociolo... (0)
Author Year Title Journal Ref Type
Curtis 2008 The Academies programme progres... Web Page
Tough 2008 Productive partnerships? an examin... Web Page
Curtis 2008 Primed for success? the characterist... Web Page
Online Search - Library Catalogue at Institute of Education
Options
Search Remote Lib
Author Contains
Year Contains
And Year Contains
5. Double-click reference to open/view. In these examples 'Whitty' is retrieved as a secondary author
6. Copy selected results to library of your choice. Click and hold 'Ctrl' for multiple selections and right click mouse to copy.
*Total no. of retrieved results.
Showing 3 of 3 references in Group. (All References: 3)
Hide Tab Pane
Ready

11. Use the **Move**, **Copy**, and **Show/Hide Selected References** commands on the **References** menu to help you review the search results. The **Preview** command at the foot of the library window used in conjunction with the **styles dropdown** at the top of the screen shows the formatted version of selected references (see illustration below).
12. To execute a new search simply select your chosen connection file and search again. A record of retrieved records is recorded in brackets beside each resource. Click on **Online References** to see all search results and **Online Trash** for those subsequently deleted.


EndNote X3 - [Online Mode]
File Edit References Groups Tools Window Help
Institute of Education These
2. Select 'output style' from dropdown
My Library
Online References (13)
Online Trash (2)
Online Search
Birkbeck College... (5)
British Library (0)
IOE Social Servic... (0)
IOE Sociological ... (0)
IOE Worldwide P... (0)
Author Year Title Journal Ref Ty
Curtis 2008 The Academies programme progres... Web F
Tough 2008 Productive partnerships? an examin... Web F
Curtis 2008 Primed for success? the characterist... Web F
Preview
Online Search - Library Catalogue at Institute of Education
Curtis, A., Whitty, G., Exley, S. and Sasia, A. (2008). Primed for success? the characteristics and practices of state schools with good track records of entry into prestigious UK universities : a report on research. [Online]. Available at: http://www.suttontrust.com/reports/PrimedforSuccess.pdf.
Retrieved and deleted search results are listed here
1. Select 'Preview'
(This example shows the IOE House Style)
Showing 3 of 3 references in Group. (All References: 13)
Hide Tab Pane
Ready

3. Import Filters

Results retrieved by searching individual resources directly can also be imported into EndNote using customised import filters. Although results are not always perfect and some manual reformatting may be required, this can still prove an effective time-saving option. If data is poorly formatted within the resource, it may not be possible to import all the data accurately so always check imported references for inconsistencies. See **content files** below for more information.

To import references from a given resource (ProQuest databases such as ASSIA, ERIC, Medline etc all use this method) -

1. Save your selected search results/references locally as a text file in tagged format.
2. Open a new or existing library. We strongly advise you create a **temporary holding library** for initial analysis/editing. When you are happy with the selection, references can then be copied to your 'main' library.
3. Select **File > Import** from the on screen drop-down menu top-left or click on the **Import** icon (down arrow) on the toolbar.
4. Navigate to the saved file.
5. Select the appropriate filter for that resource from the Import Option drop down list or search for other filters.
6. Choose the options **Import All Duplicates** and **No Translation**.
7. Click on **Import** to automatically import the saved references.

See the Intranet for the best methods for transferring references from individual resources into EndNote - intranet.ioead/ioe/cms/get.asp?cid=10170&10170_0=13428#connection.

Finding Full Text

If your retrieved or input references are electronic journal articles from titles we subscribe to and are included in the Web of Science database or contain a **DOI (Digital Object identifier)** anywhere in the record, you can often **download and attach** the full text article to a reference in your library.

Simply highlight your chosen reference(s) and click on the **Find Full Text** icon on the toolbar to attach a full text PDF.

Adding the address of our SFX link resolver to EndNote will also help **locate and link** to full text sources.

1. Select **Edit > Preferences > URLs & Links** within your library.
2. Add http://sfxhosted.exlibrisgroup.com/Ioe to the **OpenURL Path**.
3. In the **Arguments** section, change the **sid** from **ISI:WoS** to **ISI:endnote**

Then highlighting a reference and selecting **References > URL> Open URL Link** will open a menu with options to link to full text and related sources.

Please observe the usual **copyright restrictions when downloading and using such sources.**

Managing References

There are various ways to find, select, edit or delete references and navigate within a library using the commands on the toolbar. The majority of these commands are only available in **Integrated** or **Local Library Mode**. Right clicking on a reference will offer other options also.

One of the most useful is the **Groups** feature allowing you to create clusters and subsets of references within your library. **Smart Groups** are dynamically updated as you add new references or edit references in the library.

Important commands include –

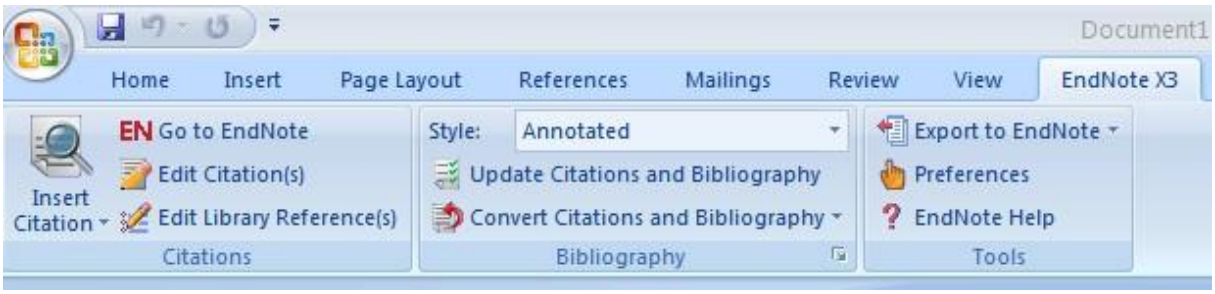
- To show all references in a library select **References > Show All References**.
- To show selected references in the library window, click on your chosen reference(s) whilst pressing control (**Ctrl**) and select **References > Show Selected References**.
- To hide selected references, click on your chosen reference(s) whilst pressing control (**Ctrl**) and select **References > Hide Selected References**.
- To create a new subgroup of references select **Groups > Create Group** and then simply 'drag and drop' references into the new group.
- To create new subsets of references within a group select **Groups > Create Group Set** and then simply 'drag and drop' references into the new group.
- To create a new subgroup of references which will update automatically using your predefined search criteria, select **Groups > Create Smart Group**.
- To sort references select **Tools > Sort Library** choosing the appropriate fields or simply click on the appropriate heading within the library window to dynamically sort that field.
- To open or edit a reference select the appropriate reference(s) and select
- **References > Edit references** or simply double click on the reference.
- To view summary information (date added, fields used, times cited etc) select the appropriate reference(s) and select **References > Record Summary** or simply right click on the reference. A library summary is available via **Tools > Library Summary**.
- To select multiple references highlight while holding down control (**Ctrl**).
- To browse through a library use the **arrows** displayed above an open reference.
- To search for duplicate entries make sure **all** references are shown and select **References > Find Duplicates**. Any duplicates found are displayed in scrollable side-by-side panes with the option to keep your preferred entry.
- To search specific fields within references including dates, keywords etc use the search option showing at the foot of the library window. The default option is **Search Whole Library**. The search interface is the same as for an online search.
- Select **Tools > Open Term Lists** to browse and edit common fields such as **author** and **keyword** automatically indexed in your library.

- To move or change data within specific fields, highlight the appropriate references and select **Tools > Change and Move Fields**.
- To export a complete bibliography as a text file first choose your preferred output style and then select **File > Export** and save appropriately.
- Select **Edit > Preferences** to change basic functionality and how your library is displayed.

Cite While You Write (CWYW)

Having established your EndNote library you can now easily add references to your Word document using the Word 2007 **EndNote tab** (see below). This replaces the CWYW toolbar in previous versions. The tab is subdivided into three groups with commands that focus on **Citations, Bibliography** and other **Tools**. Most of the commands are self-explanatory and new functionality includes the ability to integrate Word's own referencing options into EndNote.

The **IOE House Style** is applied to your citations and bibliography by default on IOE computers but hundreds of other styles are available for you to choose. See the '**content files**' section below for more information.



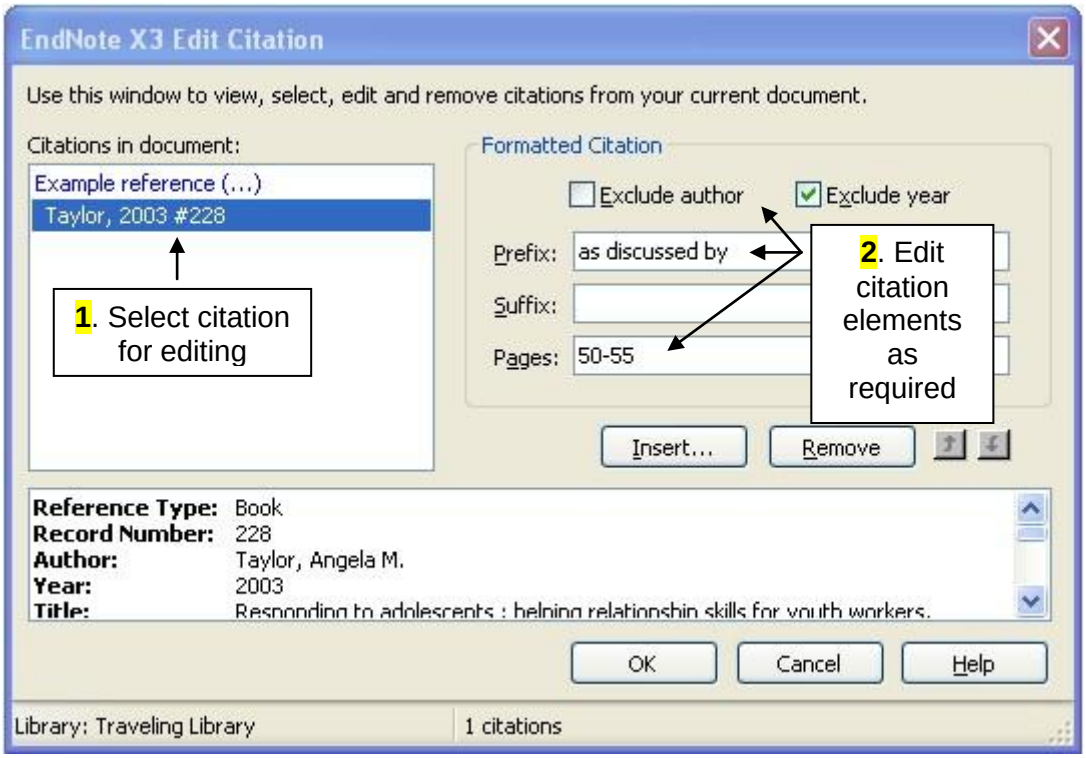
To cite a reference –

1. Start Microsoft Word and open the paper you are writing.
2. Open the EndNote library that contains the references you wish to cite using the **Go to EndNote** prompt on the tab.
3. Position the cursor in the text where you would like to insert the citation(s).
4. Select the relevant reference(s) using either of these methods –

    - Choose the **Insert Citation** option from the tab and then the **Find Citation** option from the dropdown and search for a relevant author name, keyword or other combination of terms.
    - Alternatively identify and highlight the relevant reference(s) within your library itself.

5. To insert your selections click on the **Insert Options** in the **Find Citation** dialogue window or **Insert Selected Citation(s)** from the dropdown if you have pre-selected a reference in your library. Or you can also simply 'copy and paste' or 'drag and drop' these references into the document. The latter options will insert **unformatted** citations, surrounded by curly brackets (eg. **{Taylor, 2003 #228}**) and the bibliography will not appear at the end of the document as normal. See below for formatting options.

6. The **Edit Citation(s)** command allows you to edit existing individual or multiple citations. For example adding page numbers, if your chosen output style supports this, or additional data inside the brackets, excluding an author name or date (see below). Right clicking on a citation will offer these editing options also. Simply typing or altering text within the brackets, **will not work** as EndNote controls what appears here.



7. If your citations are not automatically formatted but appear as **{Taylor, 2003 #228}** for example or a bibliography is not updated each time you insert a citation select **Update Citations and Bibliography** from the tab choosing the appropriate output style. A complete bibliography will be created at the end of your document.
8. **Instant Formatting** can be enabled via the **Preferences** option on the **Tools** tab.
9. You can toggle between linking Endnote and EndNote Web to Word for referencing via the **Preferences > Application** option on the **Tools** tab and entering your EndNote Web credentials there.
10. Other useful commands include –

- **Convert Citations and Bibliography** to unformat citations or produce a plain text copy of the document without embedded EndNote code.
- **Export Travelling Library** under the **Export to EndNote** option to create a library of only those references used in the document.

Content Files (Connections, Filters and Styles)

When you buy Endnote X3 it comes preloaded with a range of content files to retrieve and format references but to reduce delays when loading the programme, the full range is no longer installed.

Other types can be downloaded from the web or the IOE Intranet pages (see intranet.ioead/ioe/cms/get.asp?cid=10170&10170_0=13428) as required. To download from the web choose Edit > Connection Files > Open Connection Manager > Get more on the Web. It is the same basic procedure for filters and styles. The most important files for IOE users include the IOE House Style and the IOE Library Catalogue connection file and are included on all IOE computers.

See the '**help and advice**' section above for more sources of information on using EndNote.

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For further eLibrary Resource Guides see www.ioe.ac.uk/library/guides